Operations & Staffing

This area explores the organizational policy, culture, and operating environment and considers the composition of any paid staff.

Composition

Who are the staff?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ No staff have lived experience.	☐ A few staff with lived experience hold junior positions.	☐ Most staff have lived experience, and some are in leadership roles.	☐ Foundation is fully controlled and managed by people with lived experience. Term limits for leadership positions are in place to ensure diverse and rotating representation from community.

What is the staff relationship with the community impacted by funding?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ Staff have no personal relationships with community.	☐ A few staff have direct, personal relationships with community.	☐ Many staff have personal relationships with community.	☐ All staff have strong personal relationships with community.

Policies & procedures

Who is involved in determining organizational policies and procedures?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ Operational policies and procedures such as risk assessment, human resources, conflict of interest, data, fraud, whistleblowing, grievances, and safeguarding are developed and ratified only by foundation.	☐ Foundation defines and manages most operational policies and procedures. Community input is sought only for policies and procedures affecting grantees, such as program evaluation. However, this feedback is not shared with grantees.	☐ Grantee input is sought, valued, and incorporated when developing many operating policies and procedures. Input from broader community may be sought.	☐ All operational policies and procedures are developed by community-led foundation, with input from grantees and broader community.

Culture

Are participatory approaches valued and used?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ Participatory and power-shifting approaches are neither valued nor utilized within foundation.	☐ Participatory and power-shifting approaches are explored when developing policies and procedures affecting grantees, but not in other areas of foundation operations.	☐ Participatory and power-shifting approaches are used internally, and foundation intentionally makes space for community leadership.	☐ Staff are recruited, hired, and supported for utilizing participatory and power-shifting approaches in their work.

Is the foundation's culture democratic and open?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ Culture is hierarchical and secretive and does not tolerate conflict or disagreement.	☐ Internal decision-making processes are transparent and clear, and there is some tolerance for discussion of conflict and failure.	☐ Culture is more horizontal. Disagreements and conflicts are discussed openly and used by all as opportunities for healthy change.	☐ Culture is one of learning, transparency, and openness to conflict and disagreement.

Is there a focus on diversity, equity, inclusion, and accessibility?

Little or no participation:	Some participation:	Substantial participation:	Full participation:
☐ There is no attention to diversity, equity, inclusion, accessibility, or other power analyses as they relate to grantees or community, or to internal operations and staffing of foundation.	☐ Foundation has started to consider equity, inclusion, diversity, accessibility, and other power analyses, primarily in relationship to grantee community.	☐ Foundation considers diversity, equity, inclusion, and accessibility in hiring as well as in relationship to grantees.	☐ Diversity, equity, inclusion, and accessibility are prioritized at all levels, interactions, and processes, whether external or internal to foundation.

Why did you select the statements you did?

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Additional questions to consider:

- Are grantees and community involved in creating foundation job descriptions, in hiring, and in performance reviews? Do staff performance assessments incorporate feedback from grantees, partners, and people external to the foundation?
- Do staff have proximity to the situations that grantees and community are facing; for example, do staff reside in areas where communities live?
- Does the foundation offer training and support to staff to develop skills on participation, including facilitation, group dynamics, racial equity, inclusion, and accessibility?
- How is involvement of people with lived experience, grantees, and community perceived within the foundation? Is this involvement perceived to advance foundation understanding and, thus, impact, and to increase fairness and equity of grants, or is it seen as a conflict of interest?
- Is the foundation a worker-owned or worker-operated model? Are staff unionized?

Resources:

- **Racial Equity Tools**, by MP Associates, CAPD and World Trust Educational Services
- **Getting Comfortable with Talking about Bias**, by PEAK Grantmaking
- **Transforming Organizational Culture Assessment Tool**, by Maggie Potapchuk
- **Disability Justice: An Audit Tool**, written by Leah Lakshmi Piepzna-Samarasinha, envisioned by Stacey Park Milbern and Leah Lakshmi Piepzna-Samarasinha
- **White Supremacy Culture Characteristics**, by Tema Okun and Kenneth Jones
- **Funders & Wellbeing Group Global Learning Community**
- **Trust-Based Philanthropy Self-Reflection Tool**, by Trust-Based Philanthropy Project